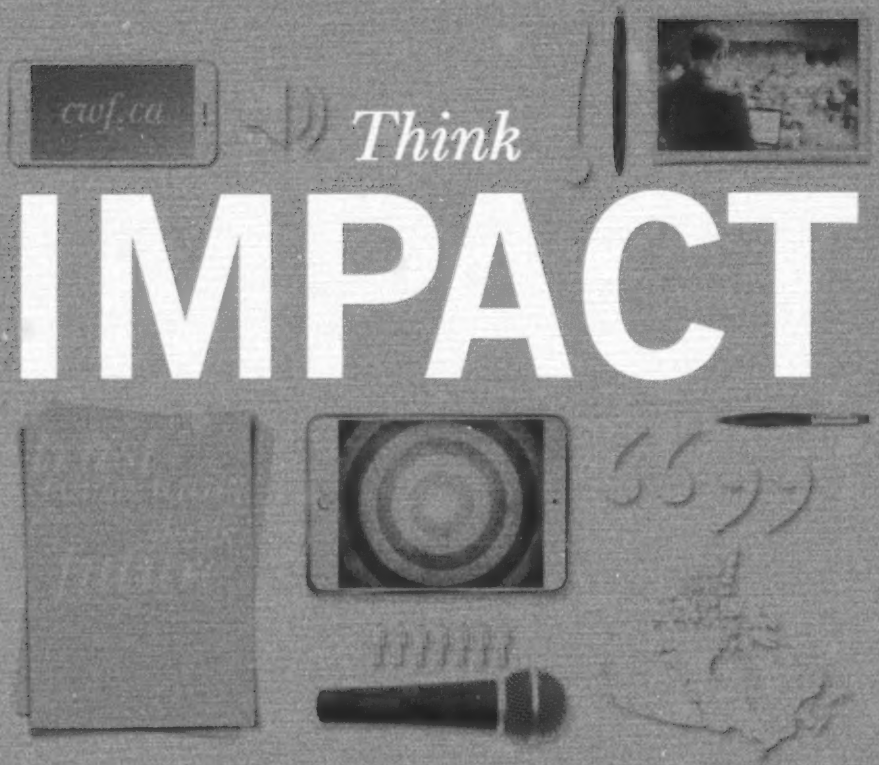
CANADA WEST FOUNDATION



Think

IMPACT

ANNUAL 2014 REPORT

Canada West Foundation

www.cwf.ca

Our vision is a dynamic and prosperous West
in a strong Canada. To realize that vision,

we think

about what it means –
healthy communities, a robust economy,
breathable air and quality of life.
We do original research and objective financial analysis,
generate commentary and
convene people across the West.

OUR BOARD OF DIRECTORS

Back (left to right): Brad Ferguson, Jim Eldridge, Charlie Fischer, Raymond Crossley, Theresa Arsenault, Jim Richardson, Robin Silvester, Pat Yashwa, Dick Carter, Bob Lindner, Charles Loewen, Tom Huffaker, Brenda Eaton.
Front (left to right): Larry Blain, Drysdale Lennie, Charles Jago, Geoff Plant, Dylan Jones, Janice MacKinnon, Edward Kennedy.
Missing: Ida Goodreau, Diane Gray, Gary Merasty, Sanford Riley.

MESSAGE FROM THE CHAIR & PRESIDENT

Dear Friends of the Foundation,

As history buffs will know, the Canada West Foundation was formed in 1971 after a conference in Lethbridge, Alta., explored the feasibility of forming one western province out of the four. Although it was obvious that a single political entity was not feasible, the organizers understood what we know so well today – the West can do more when it speaks with one voice. The Foundation remains committed to that objective today.

Two-and-a-half years ago, the Foundation reorganized as a truly pan-western think tank. Our reach extends from the prairie fields of Manitoba to the salmon fisheries of British Columbia. To realize our mandate, we travelled widely in 2014, holding events and giving speeches and presentations in Winnipeg, Regina, Saskatoon and Vancouver, as well as Edmonton and Calgary.

Our actions had impact. In Calgary, our Mexico energy event revealed to Canadian companies the tremendous opportunities awaiting them there, and companies responded. In Regina, we moderated a meeting of the three New West Partnership premiers and business leaders to resolve obstacles to getting western goods to international markets. In Manitoba, we conducted a "politics-in-full-sentences" discussion with Premier Greg Selinger. In British Columbia, our community dinner brought together leaders to discuss that province's connection with the broader West.

We published research on urban energy management, public support for development of the West's four major resource industries, skills gaps in our workforce, improving our trade infrastructure and understanding reforms to the Temporary Foreign Worker Program.

Convening leaders to have thoughtful discussions about the things that matter most to the West. Looking for practical solutions that policy makers and business leaders can act on today. Seeking ways the West can attain – and sustain – the prosperity and quality of life we value so highly. That's what drives us. That is why we remain so grateful for the ongoing support we receive.

It is also why we remain steadfastly optimistic that the West will meet the challenges it faces head on and succeed in a hyper-competitive global marketplace. The views of our members and supporters are vital to the ongoing dialogue. We encourage you to let us know what is on your mind.

Sincerely,

Geoff Plant
Chair

Dylan Jones
President & Chief Executive Officer

Think

OUT LOUD

It's not just

what we think

that matters. It's what we say, it's who listens,
and it's how far our reach extends,
in the West, across Canada and beyond,
that makes a difference.

2014 Year-in-Review

February

FEB. 04

CURRENTS

The falling Canadian dollar & social licence in the West

April

APR. 21

Buildings, Bicycles & 'Burbs

An overview of Urban Energy Management in Seven Western Canadian Cities

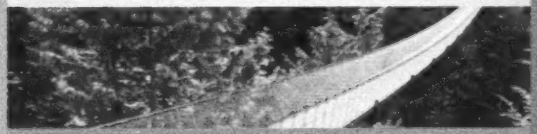
ENERGY SAVINGS SUCCESSES & BATTLES

May

MAY 06

CURRENTS

Western entrepreneurs take the lead



MAY 26

From THE Ground Up

Earning Public Support for Resource Development

WINNING TRUST IN CANADA'S RESOURCE INDUSTRY

June

JUNE 02

MEXICO ENERGY REFORM

Calgary

New opportunities for Alberta businesses & the Mexican government

July

JULY 18

Restoring Trust

The Road to Public Support for Resource Industries

ANALYZING A MAJOR SURVEY ON ATTITUDES IN THE WEST TOWARD RESOURCE INDUSTRIES

IN THE NEWS

8	45	483	489
NATIONAL OP-EDS	REGIONAL OP-EDS	MEDIA MENTIONS	PARTICIPANTS IN OUR EVENTS

"Our research only makes a difference when it is read by engaged citizens & policy makers."
DOUG FIRBY, Director of Communications

August

AUG. 09
CURRENTS
Floods in Saskatchewan & Manitoba, growth in B.C. & Alberta

September

SEPT. 15
Talent is not Enough
Closing the Skills Gap

FIXING THE SKILLS GAP IN THE WORKFORCE

November

NOV. 6
NEW WEST PARTNERSHIP INFRASTRUCTURE SUMMIT
Regina

Saskatchewan, Alberta & B.C. premiers meet with industry leaders to talk market access

NOV. 13
CURRENTS
Canadians moving West & geopolitics spoiling the global economy recovery party

NOV. 24
Building on Advantage
Improving Canada's Trade Infrastructure

IMPROVING CANADA'S SYSTEM FOR MOVING GOODS TO MARKET

December

DEC. 15
Shedding Light
ON THE TEMPORARY FOREIGN WORKER PROGRAM

Explaining the impact of the overhauled TFWP

DEC. 24
THE BUSINESS CASE
for an Alberta International Development Office

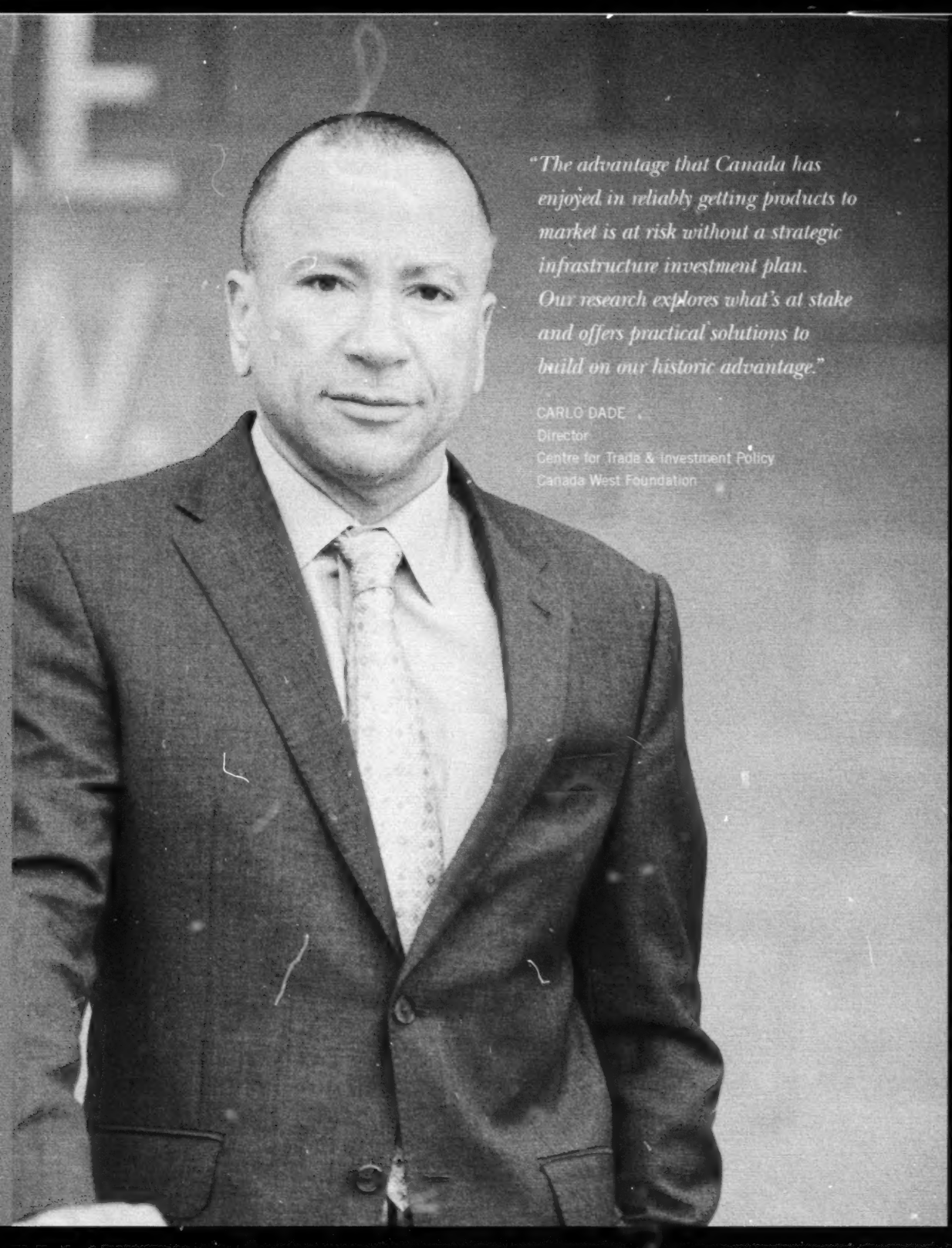
39
SPEECHES OR PRESENTATIONS

455,252,324
PRINT/ONLINE REACH

cwf.ca
Canada West Foundation

CHANGING THE WAY

we think



"The advantage that Canada has enjoyed in reliably getting products to market is at risk without a strategic infrastructure investment plan. Our research explores what's at stake and offers practical solutions to build on our historic advantage."

CARLO DADE
Director
Centre for Trade & Investment Policy
Canada West Foundation

"Natural resources in western Canada face a public support challenge. Our research helps frame the problem at a deeper level, which lays the foundation upon which to build truly responsible resource industries."

TREVOR MCLEOD
Director
Centre for Natural Resources Policy
Canada West Foundation

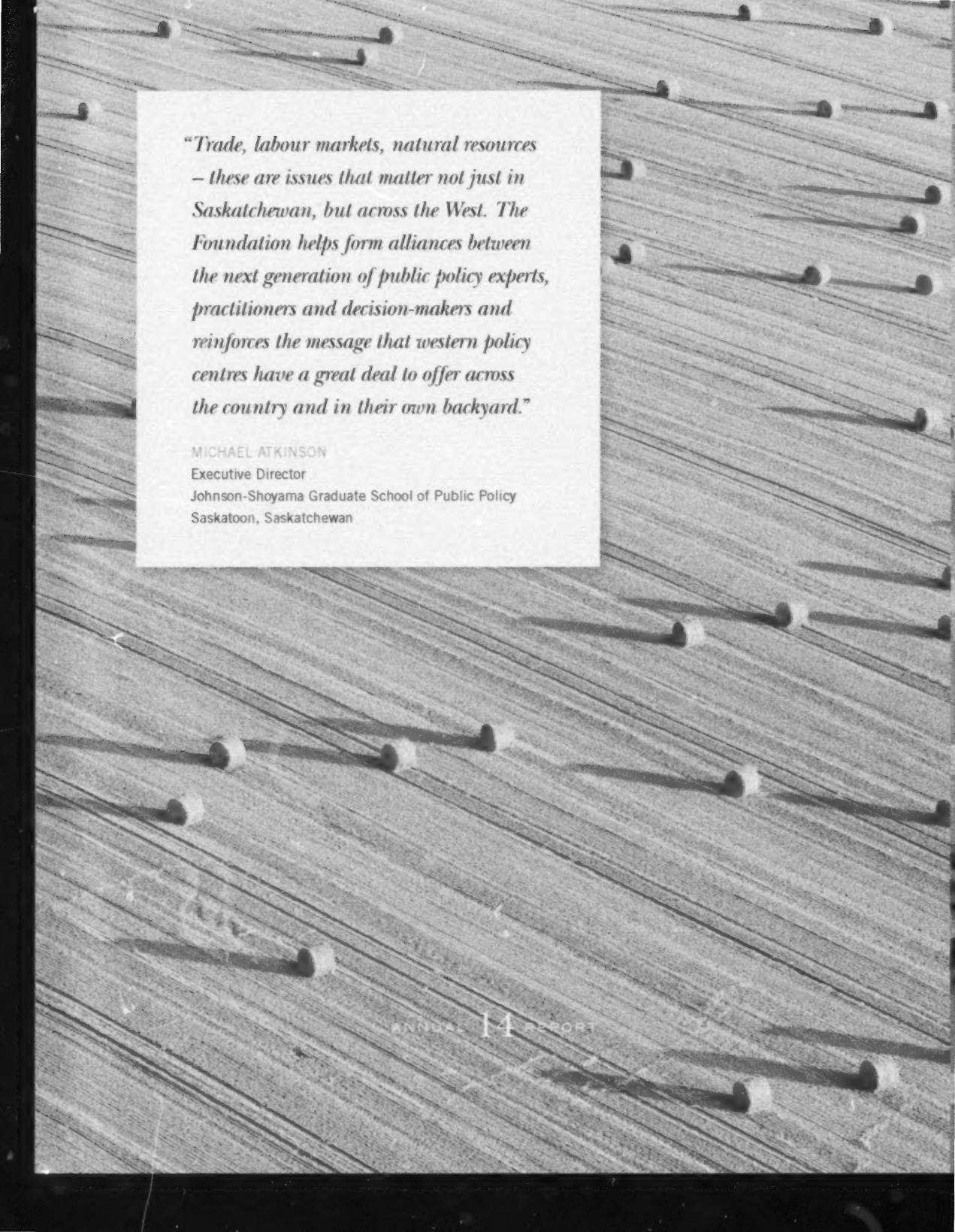
"Skills mismatches are hurting individuals, business and, ultimately, society. Business and government need to address issues ranging from the shortage of some technical workers, to inadequate essential skills levels to underemployment of our recent post-secondary graduates. Our research points the way."

JANET LANE
Director
Centre for Human Capital Policy
Canada West Foundation

Think

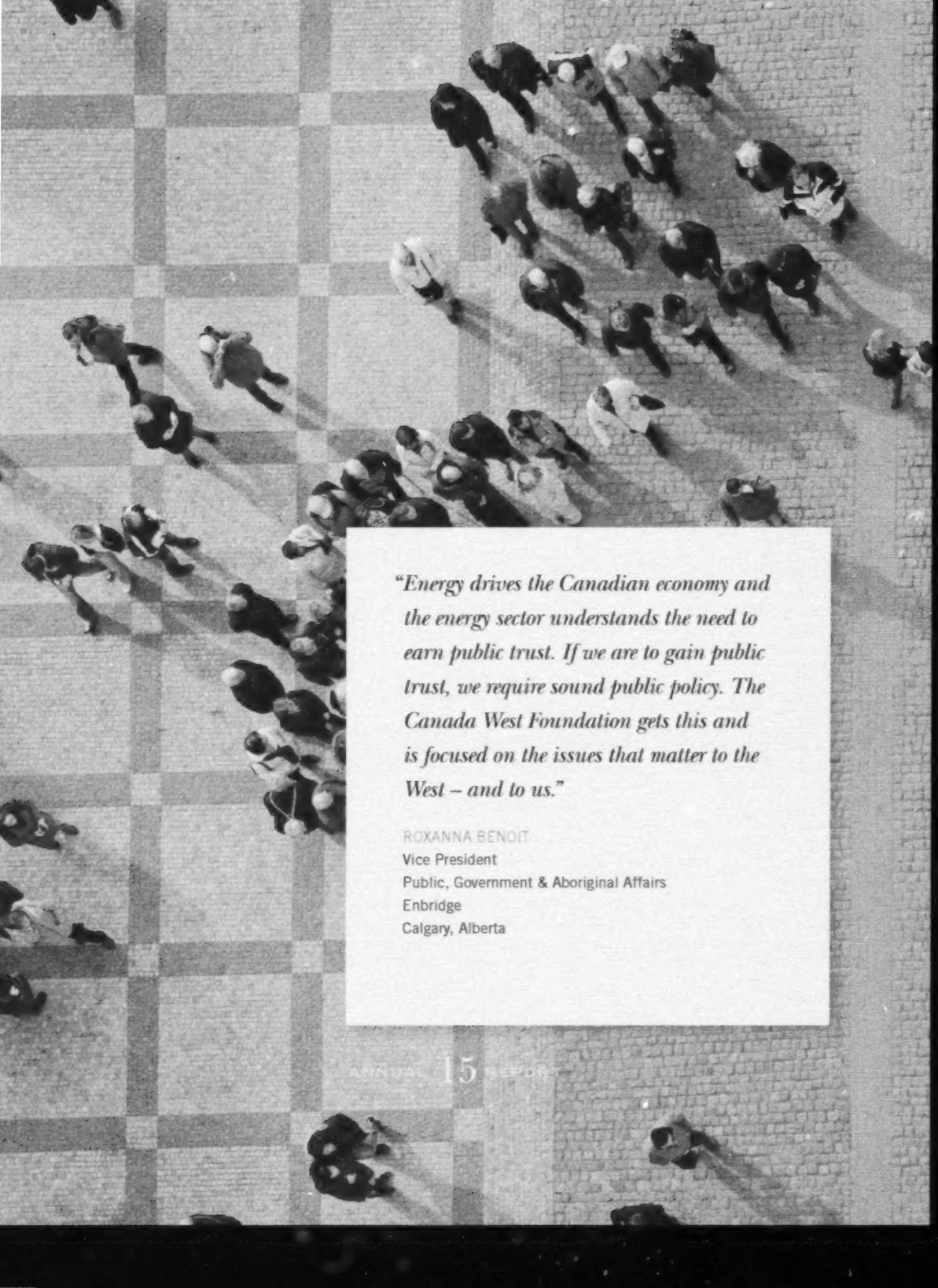
COMMUNITY

Strong communities
are the cornerstone of the western way of life.
To nurture those communities,
the Foundation explores the public policy issues,
provides unbiased facts and analysis, and
convenes engaged members of civic society.
This work helps ensure our leaders
have the tools needed to constantly improve
the quality of life for the people of
British Columbia, Alberta, Saskatchewan and Manitoba.
We provide a vital voice for westerners' interests,
frustrations and aspirations.



"Trade, labour markets, natural resources – these are issues that matter not just in Saskatchewan, but across the West. The Foundation helps form alliances between the next generation of public policy experts, practitioners and decision-makers and reinforces the message that western policy centres have a great deal to offer across the country and in their own backyard."

MICHAEL ATKINSON
Executive Director
Johnson-Shoyama Graduate School of Public Policy
Saskatoon, Saskatchewan



"Energy drives the Canadian economy and the energy sector understands the need to earn public trust. If we are to gain public trust, we require sound public policy. The Canada West Foundation gets this and is focused on the issues that matter to the West – and to us."

ROXANNA BENOIT
Vice President
Public, Government & Aboriginal Affairs
Enbridge
Calgary, Alberta

Think

GLOBAL

Impact

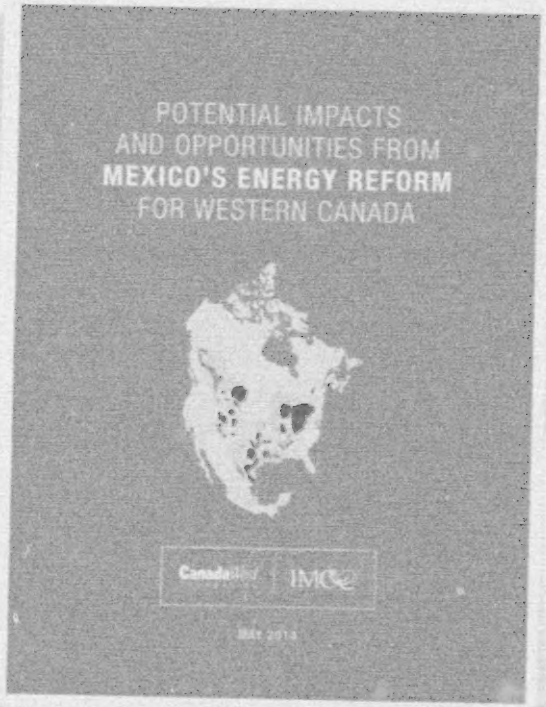
On June 2, the Foundation convened more than 100 business leaders in Calgary for the Mexican government's first foreign presentation on energy reform. The Mexican government forged

new relationships

in Alberta. Canadian companies found new business in Mexico's private and public sectors.

opportunities for western canada

June 02
2014



"Through a survey and anecdotal comments, our members told us that after the U.S., Mexico is the place they prefer to look for new opportunities. The Mexico Energy Reform event put on by the Foundation, and which we sponsored, gave our members insights about the great opportunities Canadian resource companies have in Mexico as it opens to private investment."

MARK SALKELD
President and CEO
Petroleum Services Association of Canada
Calgary, Alberta

Think

TRUST

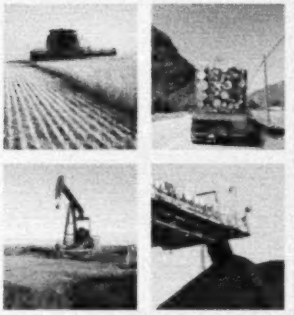
Resource development turns on

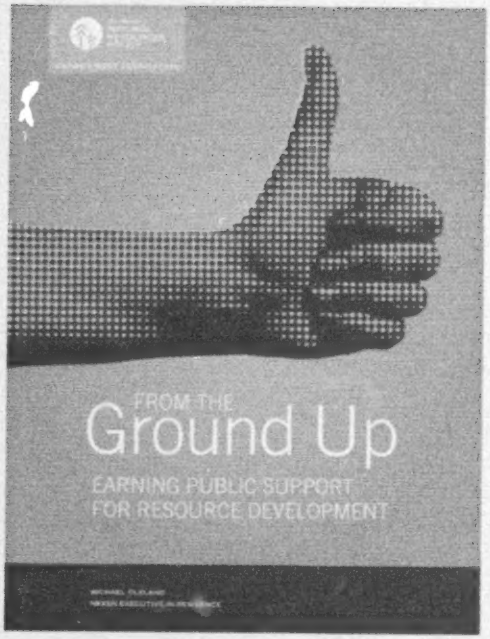
public trust.

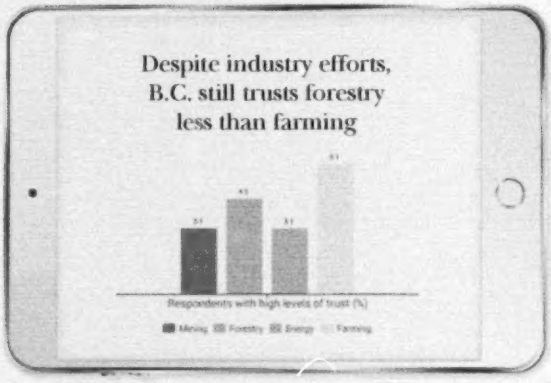
Canada has had an ad hoc approach to social licence,
even as billions of dollars in new development
depends on building meaningful relationships with the public.
The Foundation commissioned deep public opinion research
in *Restoring Trust.* And, in *From the Ground Up,*
we provided a road map to improving public support.

The essential ingredient in renewed public support is real improvement in how companies perform *'on the ground' in communities* directly affected by resource development.

– FROM THE GROUND UP







"The Foundation's research rings true in my field – social licence can make a real difference. Aboriginal community buy-in, for example, is happening in a major way in Canada in hydro projects. Is it easy? No. Is it perfect? No. It takes time and money and effort to build real relationships on project planning and design and environmental and social issues – the full process – but we get there in the end."

ED WOJCZYNSKI
Division Manager, Portfolio Projects Management
Manitoba Hydro
Winnipeg, Manitoba

Think

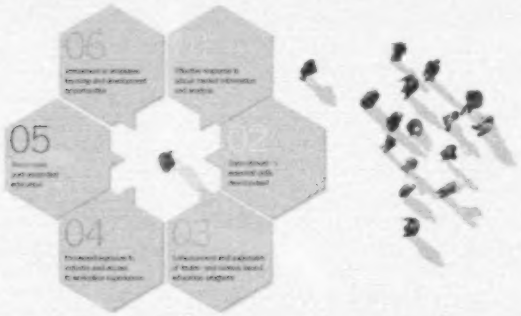
SKILLS

Canada's employers have a big problem:
Not only are there not enough skilled workers, but many of those
already in the workforce also don't have the

core skills

they need to communicate, make decisions or think critically.
In *Talent is Not Enough*, the Foundation explained
why employers and government should be alarmed
by the growing skills gap –
and what we can do to fix the problem.

PATHWAYS *to* SUCCESS



Skills gaps are already hurting our quality of life & these gaps will widen as the economy grows.

Skills Gap

"In the manufacturing sector, the lion's share of job training must be done in the workplace. Even greater focus, and investments, in human capital will be required to enhance productivity and ensure manufacturers' competitiveness. The Canada West Foundation has defined the issue and provided solutions to close skills gaps and enhance our industry in the West."

DAVID PLANTE
Vice President
Canadian Manufacturers & Exporters, AB Division
Edmonton, Alberta

Think about the

FUTURE

The Jim Hume Student Internship Program

The Jim Hume Student Internship Program gives students of public policy an opportunity to gain real work experience in a fast-paced environment. Interns do research, collaborate with senior researchers and author original documents under the mentorship of the Foundation's research directors. Here is what our 2014 interns said about their experience:

"My internship experience gave me the opportunity to work with industry professionals on the front lines of public policy research. I'm confident that the knowledge I gained and the connections I made will have a positive and lasting effect on my professional career."

CONNOR BATES

"The coaching and mentorship I received from the Foundation's directors and president strengthened my policy skills far more than any coursework could ever do. I appreciated being considered a full member of the team right from Day 1, and the great work atmosphere in the organization."

NAOMI CHRISTENSEN

"I benefited tremendously from the internship experience at the Canada West Foundation.... There are great events, high-profile speakers and the wonderful team to work with."

CHENDONG LI

"In addition to gaining valuable research skills from mentors, my experiences instilled in me a passion and pride in the West that I hope to demonstrate throughout my career."

PAWEL MIRSKI

Think

FISCAL

Common Sense

Fiscal prudence is a western value.
The Foundation helps foster economic common sense
by analyzing provincial and federal budgets
and publishing the *Currents* economic update newsletter
four times per year.

CURRENTS is made possible with the financial support of Canadian Western Bank

2014 FINANCIAL HIGHLIGHTS

December 31, 2014 with comparative figures for 2013

	2014	2013
Assets	$ 514,414	$ 418,545
Investments	8,746,365	8,539,209
	$ 9,260,779	$ 8,957,754
Current Liabilities	$ 402,331	$ 448,377
Net Assets	8,858,448	8,509,377
Revenues from operations	$ 1,991,048	$ 1,746,539
Operating expenses	2,420,769	2,203,756
Operating shortfall	(429,721)	$ (457,217)
Net investment income	$ 778,792	$ 1,320,241

Think discovery

The Hon. James A. Richardson Discovery Roundtables

In 2014, we assembled industry, educators and government in Edmonton to explore the extent of skills gaps in workers and how those gaps can be closed. The learnings laid the groundwork for the *Talent is Not Enough* research paper.

We brought together industry and government in Winnipeg to discuss the state of Canada's trade infrastructure. The input from that event was captured and incorporated into the research paper: *Building on Advantage: Improving Canada's Trade Infrastructure.*

The Roger Gibbins Policy Innovation Fund

Noted economist, author and television host Linda Nazareth spoke in Calgary on the subject of *Economorphics*, the impact of demographics on Canada's economy.

The Honourable
James A. Richardson
DISCOVERY ROUNDTABLES

ROGER GIBBINS
Policy Innovation Fund

THANK YOU
TO OUR SUPPORTERS

Chair's Circle

CHAMPION $300,000+

Anonymous donor
The Arthur J.E. Child Foundation
Government of Alberta
Government of Saskatchewan
Crown Investments Corporation of Saskatchewan
Ministry of the Economy & Enterprise Saskatchewan
Max Bell Foundation

BUILDER $150,000-$299,999

Edwards, N. Murray
Enbridge Inc.
Mannix, Ron/Coril Holdings Ltd.

Foundation Circle

CATALYST $25,000-$74,999

Canadian Natural Resources Limited
Gray, Jim
Imperial Oil Limited
James Richardson & Sons Limited/ Richardson International/Tundra Oil & Gas Partnership
Richardson, Jim
Western Financial Group

STAKEHOLDER $10,000-$24,999

Anonymous donor
The Asper Foundation
Dinning, Jim & Evelyn Main
Fischer, Charles & Joanne Cuthbertson
Investors Group Financial Services Inc.
Pinder, Richard H.
Riley, Sanford & Deborah
Stern, Ronald
Surkan, Gail & Roger

President's Circle

PIONEER $75,000-$99,999

ATB Corporate Financial Services
The Community Fund at the Calgary Foundation
The Mosaic Company
Port Metro Vancouver

80.7%

OF $3-MILLION GOAL

Campaign total to April 1, 2015 is

$2,420,194

BENEFACTOR $5,000-$9,999

Benidickson, Kristjan M.
Export Development Canada
Johnson Waste Management Ltd.
Jones, Dylan
Lennie, Oryssia & Malcolm
Merasty, Gary
Pirie Foundation
Tron Power Ltd. Partnership

SUPPORTER $1,000-$4,999

Anonymous donor
Birdsell, Judy
Burns, James W.
Carter, Dick & Melinda
Crossley, Raymond & Jeannine
Dade, Carlo & Savera Hayat-Dade
Eaton, Brenda J.
Eldridge, James
Felesky, Brian
Firby, Doug & Lisa Monforton
Gibbins, Roger
Goodreau, Ida
Gray, Diane
Harder, Catherine
Huffaker, Tom
Jago, Dr. Charles, C.M., O.BC
Kranenburg, Vicki
Lane, Janet
Linner, Bob
Loewen, Charles
MacKinnon, Janice
Mitchell, John & Maggie
Pinder, Herb C.
Pinder, Tyler Hughes
Plant, Geoff & Janet
Roach, Rob & Jacqueline Fyvie
Shelter Canadian Properties Limited
Spencer, Barry
Youzwa, Patricia S.

FRIEND $100-$999

Anonymous donors
Arsenault, Theresa
Cleland, Mike
Holden, Mike
Humphrey, Hector
Lacerte, Sophie
Manasek, Marcella
Stirrett, Shawna & Brad
Strathern, Rachael
Way, Nessima & Mark

Canada West Foundation Invest in the West Campaign total to April 1, 2015

Think support that makes a difference

The people & companies
that support the Foundation believe that
engaged public policy discussions
will help build a stronger & healthier West.

Canada West Foundation
900 – 105 12th Avenue SE, Calgary AB T2G 1A1
www.cwf.ca